# Trust Board

**Meeting Date:** 4th June 2019  
**Title:** Fundraising Strategy 2019-2022  
**Executive Summary:**  
The overarching objective of the Fundraising Strategy is to provide a Trust Wide framework to ensure the Charity is fit for purpose and is flexible enough to develop its activities in line with Charitable Fund purposes set out in the governing documents.  

It provides a strategic vision that details how specific approaches to fundraising will enhance and increase the positive impact The Royal Wolverhampton NHS Trust Charity has on its patients and staff.  

Establish clear lines of accountability and relationships within and outside the Trust in respect of Charitable Funds, to include a review of the Strategy itself.  

The strategy applies to all Trust staff, volunteers and third parties who support the work of the Charity or wish to fundraise in aid of a third party charity on RWT sites.  

**Action Requested:**  
Request that the Board approve the Fundraising Strategy 2019-2022.  

**For the attention of the Board**  
Approve  

**Author + Contact Details:** Leanne Bood, Fundraising Coordinator.  
X4473  leanne.bood@nhs.net  

**Links to Trust Strategic Objectives**  
2. Proactively seek opportunities to develop our services  
4. Attract, retain and develop our staff, and improve employee engagement  
5. Maintain financial health – Appropriate investment to patient services  
6. Be in the top 25% of all key performance indicators  

**Resource Implications:**  
Financial, workforce and time implications include:  
- The recruitment, selection, ongoing training and expenses incurred of having a Volunteer Ambassador Team as a resource to support fundraising and promote the Charity and how it supports the Trust.  
- The development of a “Charity Hub” within New Cross Hospital.  

Resource implications will be met within the approved Fundraising budget.  

**CQC Domains**  
Well-led: the leadership, management and governance of the organisation make sure it's providing high-quality care that's based around individual needs, that it encourages learning and innovation, and that it promotes an open and fair culture.  

**Equality and Diversity Impact**  
An Equality Impact Assessment has been completed. The Charity and its Fundraising Strategy will continue to operate in accordance with existing Trust policies and strategies, particularly the Patient Experience Strategy and the Trusts Equality Objectives.  

**Risks: BAF/ TRR**  
The RWT Charity Fundraising Strategy takes into account any organisational, financial and reputational risks. The Charity will effectively manage risk so the key objectives set by trustees are achieved. The Charity’s approach to fundraising has clearly defined processes in place for the protection of the Trust, the Charity, patients, their families and other stakeholders.  

**Public or Private:** Public  

**Other formal bodies involved:** The RWT Charitable Funds Committee and the Head of Communications have been consulted throughout. The Trust policy group have been consulted on the strategy and there have been no comments or concerns fed back.  

**References**  
**NHS Constitution:**

In determining this matter, the Board should have regard to the Core principles contained in the Constitution of:

- Equality of treatment and access to services
- High standards of excellence and professionalism
- Service user preferences
- Cross community working
- Best Value
- Accountability through local influence and scrutiny

**Report Details**

<table>
<thead>
<tr>
<th>1</th>
<th>The mission of the RWT Charity is to provide additional resources not usually provided by the NHS. It supports the Trust to achieve its vision and values of being safe and effective, kind and caring and to exceed expectation. The Charity’s objective is to support the following:</th>
</tr>
</thead>
</table>
| | - Additional facilities and an improved environment.  
| | - Additional equipment that can make a real difference to patient care.  
| | - Additional opportunities for staff training.  
| | - Additional opportunities to further medical knowledge through research |

Stakeholders (including Trust staff, volunteers and third parties who support the work of the Charity) will benefit from the strategy as it clearly demonstrates the Charity’s fundraising priorities and future aspirations. Detailed plans specify how these priorities will be met and educate stakeholders on ways in which their work can support us to meet these priorities.

The Charity Marketing and Communications Plan will support the charity’s aim to deliver consistent, effective and professional communications with all of its internal and external stakeholders so that they are fully informed, engaged and supportive of The Royal Wolverhampton NHS Trust Charity and its objectives.

It will support the delivery and execution of the Charity Priorities and New Income Generation plan; which details the strategic aims of the charity. These are split into key areas of income generation that have been identified as:

- External Charitable Trusts & Corporate Support  
- In Memorium Giving, legacies and fundraising  
- Community (Individual fundraisers, Gift Aid third party and RWT Charity events)  
- Investment Income  
- Charity trading activities
Charity Fundraising Strategy

The Royal Wolverhampton NHS Trust Charity
Fundraising Strategy 2019-2022
## Section | Page
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Glossary

**Fundraising**
The act of collecting or producing money for a particular purpose for Charity.

**Donors/Fundraisers/Supporters**
Groups, individuals, organisations or businesses that support the Charity through the donation of goods, services or monies and/or those that chose to facilitate fundraising events to generate funds for the Charity.

1.0 Aim / Objectives

This strategy document supports a consistent, effective and professional approach to communications and fundraising ability of the Charity. It provides a Trust Wide framework to ensure the Charity is fit for purpose and is flexible enough to develop its activities in line with Charitable Fund purposes set out in the governing documents.

The overall objectives of this strategy include:

- Establish clear lines of accountability for staff and the consideration of relationships within and outside the Trust in respect of Charitable Funds.

- Establish and review particular income streams/income generation activities that have a positive impact on the Charity’s work.

- Establish sound governance and compliance with legislation and good practice guidance issued by the Charities Commission, the Fundraising Regulator, the Trust and any other regulatory bodies.

- Provide a Trust Wide framework to ensure the Charity is fit for purpose and is flexible enough to develop its activities in line with Charitable Fund purposes set out in the governing documents.

- Propose a performance management process to include involvement of stakeholders, promote efficiency and define and monitor reporting mechanisms.

- To ensure the Charity optimizes use of resources through effective management.
2.0 Scope
A Trust wide framework ensures that the Charity is fit for purpose and is flexible enough to develop its activities. Details of which can be found within the following documents:

Attachment 1  The RWT Charity Marketing & Communications Plan
Attachment 2  Charity priorities and new income generation Plan 2019-22

The Charity’s approach to fundraising has clearly defined processes in place for the protection of the Trust, the Charity, patients, their families and other stakeholders. Details of which can be found within the following documents:

Attachment 3  Responsible Gaming Protocol
Attachment 4  Fund Advisors Guidance
Attachment 5  Procedure for fundraising in aid of the RWT Charity
Attachment 6  Process for making a donation/depositing funds raised
Attachment 7  Process to recognize and acknowledge donations
Attachment 8  Roles & Responsibilities

All associated documentation can be found in 11.0 – Appendices.

In adhering to this Policy, all applicable aspects of the Conflicts of Interest Policy must be considered and addressed. In the case of any inconsistency, the Conflict of Interest Policy is to be considered the primary and overriding Policy.
3.0  **Strategic Context / Background**

The Charity supports the Trust’s Vision of being an organisation striving continuously to improve patient experience and outcomes. We support their pledge to always strive to be safe and effective, kind and caring and to exceed expectation.

The Charity’s NHS wide objectives are as follows:

“The main purpose of the Charitable Funds held on trust is to apply income for any charitable purpose relating to the NHS and wholly or mainly for the services provided by The Royal Wolverhampton NHS Trust”

The mission of the Charity is to make a real difference to the patients of The Royal Wolverhampton NHS Trust, their families and the staff that treat them, above and beyond that which is provided by the NHS.

The Charity supports the Trust’s Vision by providing:

- Additional facilities and an improved environment
- Additional equipment that can make a real difference to patient care
- Opportunities for staff training
- Opportunities to further medical knowledge through research

With a variety of funding resources it is essential that RWT provides a consistent, transparent, effective and professional approach to donations and fundraising activities. This will assure agencies of RWT internal monitoring processes and that access to funds are legitimate to improve patient care in accordance with the Trust’s vison and values.

Our strategic priorities are aligned to the Trust’s commitment to the NHS Long Term Plan 2019 as stated below:

| Making sure everyone gets the best start in life | Maternity & Neonatal care  
| Paediatric care |
| Delivering world-class care for major health problems | Cancer care  
| Cardiovascular disease  
| Diabetes  
| Innovation & Research  
| Respiratory disease  
| Stroke care  
| Urgent & Emergency care |
| Supporting people to age well | Improving experience for carers  
| Community care – to prevent unnecessary admissions and support timely discharges from hospital  
| Dementia care  
| End of life care |
| Workforce | Staff recruitment, retention and development of work force  
| Volunteering |

3.0 Staff Requirements

Staff and volunteers will be expected to adhere to the Fundraising Strategy and seek support from the Fundraising Coordinator as and when required.

Staff and volunteers should familiarise themselves with the function of the charity. They are often the first point of contact for people with charity related queries – i.e. “how can I make a donation” and “how will my donation be used?” Please see flowchart below:
Excellent patient care received

Accurate information is received, donor feels appreciated and adequately supported to fundraise in aid of the Charity – followed by a timely “thank you”, motivating the donor to continually support RWT.

Opportunities for more advanced specialist pieces of equipment.

Opportunities for additional staff training.

Opportunities to improve facilities and environment.

Opportunities to further medical knowledge through research.

An increase in donations offers opportunities to further enhance patient experience.

Patient or family member makes initial approach to staff for information on how to donate directly or fundraise for the Trust.

An increase in donations offers opportunities to further enhance patient experience.

Excellent patient care received

Patient or family member makes initial approach to staff for information on how to donate directly or fundraise for the Trust.
4.0 Roles and responsibilities

All stakeholders (internal and external) have various roles and responsibilities within the RWT Charity Fundraising Strategy.

The Trust Board, as Corporate Trustee, is ultimately responsible for ensuring that the Charity complies with legislation and good practice guidance, has a clear vision and manages the Charity in accordance with the Charities purpose, as set out in the governing document.

The Charitable Funds Committee will be responsible for setting the vision, values, objects and mission of the charity and will be clear on how it will achieve them. They will further set achievable targets and indicators of success and will review performance against these to identify whether the aims of the Charity are being met.

Division & Directorate Management Teams and the Volunteer Coordinator are responsible for the local awareness, implementation and compliance with the requirements of this strategy.

Trust Employees and Volunteers are responsible for keeping themselves updated on any changes to the RWT Fundraising Strategy.

Further information can be found within Attachment 8 Roles and responsibilities

5.0 Structure and Approach

Key milestones have been identified to ensure the delivery of objectives and are detailed within Attachment 2 – Charity priorities & income generation plan 2019-2022

6.0 Communication of Strategy

A communication plan to support the implementation of this strategy and identify main stakeholders can be found within Attachment 1 – RWT Charity Marketing & Communications Plan 2019-2022

7.0 Evaluation and Review

The implementation of the revised RWT Charity Fundraising Strategy will ensure a continual consistent, effective and professional approach to fundraising

Subject to the findings from the Charity’s Annual report and Accounts, this strategy can be reviewed on an annual basis if required and following any “lessons learnt” from subsequent fundraising campaigns.

Any Review of this document will be completed by the Charitable Funds Committee, the Treasurer for the Charity and the Fundraising Coordinator.
### 8.0 Equality statement

An assessment has been undertaken and has identified a medium impact affecting groups with Protected Characteristics. Further information is available on request from the Fundraising Coordinator.

### 9.0 Resource assessment

<table>
<thead>
<tr>
<th></th>
<th>Question</th>
<th>Answer</th>
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<tbody>
<tr>
<td>1</td>
<td>Does the implementation of this policy require any additional Capital resources</td>
<td>Yes</td>
</tr>
<tr>
<td>2</td>
<td>Does the implementation of this policy require additional revenue resources</td>
<td>Yes</td>
</tr>
<tr>
<td>3</td>
<td>Does the implementation of this policy require additional manpower</td>
<td>Yes</td>
</tr>
<tr>
<td>4</td>
<td>Does the implementation of this policy release any manpower costs through a change in practice</td>
<td>No</td>
</tr>
<tr>
<td>5</td>
<td>Are there additional staff training costs associated with implementing this policy which cannot be delivered through current training programmes or allocated training times for staff.</td>
<td>No</td>
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Other comments
<table>
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<tr>
<th>Source of data</th>
<th>Date of publication / issue</th>
<th>Detail of requirement</th>
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<tr>
<td>Fundraising Regulator</td>
<td>2019</td>
<td><a href="https://www.fundraisingregulator.org.uk/">https://www.fundraisingregulator.org.uk/</a></td>
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</table>
11.0 Appendices and associated attachments, documentation & literature

Associated attachments

Attachment 3  Responsible Gaming Protocol
Attachment 4  Fund Advisors Guidance
Attachment 5  Procedure for fundraising in aid of the RWT Charity
Attachment 6  Process for making a donation/depositing funds
Attachment 7  Process to recognize and acknowledge donations
Attachment 8  Roles & Responsibilities

Documentation

Appendix A  Approved Expenses Guidance
Appendix B  New Fund Request Form
Appendix C  Fundraising Pack
Appendix D  Guidance on approved fundraising methods
Appendix E  Staff fundraising Risk Assessment Form
Appendix F  Staff Application to Fundraise Form
Appendix G  Fundraising Registration Form
Appendix H  Collecting Boxes Signature Form
Appendix I  Small Lotteries Guidance for Trust Employees & Volunteers
Appendix J  Charity Sponsorship Form
Appendix K  Charitable Funds Donation Form
Appendix L  Goods Donated Form
Appendix M  Gift Aid Explained Leaflet
Appendix N  Corporate Sponsorship Agreement (subject to legal advice)
Appendix O  Approved use of Charity branding
Appendix P  Trust media Consent Form
Appendix Q  Thank You Letter Template
Appendix R  Stakeholder Fundraising on site Risk Assessment
Appendix S  Volunteer Role Description
Appendix T  Charity Feedback Form
OP 01
Document Control
To be completed when submitted to the appropriate committee for consideration/approval

<table>
<thead>
<tr>
<th>Strategy number and version</th>
<th>Title of Strategy</th>
<th>Status:</th>
<th>Author:</th>
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<tr>
<td>0.2 Draft</td>
<td>The RWT Charity Fundraising Strategy 2019-2022</td>
<td>Draft</td>
<td>Fundraising Coordinator</td>
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**Director Sponsor:** Director of Workforce

**Version / Amendment History**

<table>
<thead>
<tr>
<th>The RWT Charity Fundraising Strategy 2016-2019</th>
<th>Version</th>
<th>Date</th>
<th>Author</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0.1 Final</td>
<td>Nov 2016</td>
<td>Fundraising Coordinator</td>
<td>No fundraising strategy in existence prior to this date.</td>
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**Intended Recipients:** All Trust Staff & Volunteers and Charity stakeholders - patients, families, local communities served by RWT, local and national businesses, local and national charities who provide support to RWT patients and families

**Consultation Group / Role Titles and Date:**

Trust Development Session **13.08.2018**

Chair of The RWT Charity – consultation throughout

CFC meeting minutes **13.08.2018, 26.11.2018, 18.03.2019,**

Head of Communications- consultation throughout

Volunteer Coordinator (ongoing consultation and support with volunteer role within the strategy, support framework for volunteers, references, Occy Health checks and DBS checks)

Trust Policy group: comments via email-submitted to trust Secretary **14.05.2019**

<table>
<thead>
<tr>
<th>Name and date of Trust level group where reviewed</th>
<th>Trust Policy Group May 2019</th>
</tr>
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<tbody>
<tr>
<td>Name and date of final approval committee</td>
<td>Trust Board June 2019</td>
</tr>
<tr>
<td>Date of Strategy issue</td>
<td>June 2019</td>
</tr>
<tr>
<td>Review Date and Frequency (standard review frequency is 3 yearly unless otherwise indicated)</td>
<td>2022 and then every 3 years</td>
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<tr>
<td>Training and Dissemination: On-going to all staff &amp; volunteers via cascade, intranet and induction.</td>
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<table>
<thead>
<tr>
<th>To be read in conjunction with:</th>
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<tbody>
<tr>
<td>G102 Financial Management</td>
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<tr>
<td>HS 01 Health &amp; Safety Policy</td>
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<tr>
<td>OP12 Information Security Policy</td>
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<tr>
<td>OP13 Information Governance Policy</td>
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<tr>
<td>OP85 Information Sharing Policy</td>
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<tr>
<td>OP06 Media Relations Policy</td>
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<tr>
<td>OP105 VIP/Celebrity Visitors to the Trust Patient Experience Strategy</td>
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<tr>
<td>OP 68 Volunteer Policy</td>
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<tr>
<td>The Royal Wolverhampton NHS Trust Communications Strategy</td>
</tr>
<tr>
<td>The Royal Wolverhampton NHS Trust Charity Marketing &amp; Communications Plan</td>
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<table>
<thead>
<tr>
<th>Initial Equality Impact Assessment (all policies):</th>
<th>Completed Yes</th>
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<tbody>
<tr>
<td>Full Equality Impact assessment (as required):</td>
<td>Completed No / NA</td>
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If you require this document in an alternative format e.g., larger print please contact Policy Administrator 8904

| Monitoring arrangements and Committee | Charitable Fund Committee |

<table>
<thead>
<tr>
<th>Document summary/key issues covered.</th>
</tr>
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<tbody>
<tr>
<td>This strategy supports the Charity’s aim for a consistent, effective and professional approach to fundraising. It provides a Trust Wide framework to ensure the Charity is fit for purpose and is flexible enough to develop its activities in line with Charitable Fund purposes set out in the governing documents.</td>
</tr>
</tbody>
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| Key words for intranet searching purposes | Fundraising, Charity, Donations. |
## IMPLEMENTATION PLAN

To be completed when submitted to the appropriate committee for consideration/approval

<table>
<thead>
<tr>
<th>Strategy number and version</th>
<th>Title of Strategy</th>
<th>Date reviewed: May 2019</th>
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</table>

### Reviewing Group

**Implementation lead:** Leanne Bood, Fundraising Coordinator. (01902) 447293, leanne.bood@nhs.net

<table>
<thead>
<tr>
<th>Implementation Issue to be considered (add additional issues where necessary)</th>
<th>Action Summary</th>
<th>Action lead / s (Timescale for completion)</th>
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</thead>
<tbody>
<tr>
<td>Strategy; Consider (if appropriate)</td>
<td>An AUB will be sent to all staff to inform them that the strategy has been reviewed and direct them to the intranet where the strategy and associated procedures for them to follow will be available. Alternatively, if staff members contact the Fundraising Coordinator they will send all information required electronically.</td>
<td><strong>June 2019</strong> Following approval by Trust Policy Group, Fundraising Coordinator will liaise with colleagues in IT and Communications Team to ensure the strategy and associated procedures are available online.</td>
</tr>
<tr>
<td>1. Development of a pocket guide of strategy aims for staff</td>
<td></td>
<td><strong>Complete</strong></td>
</tr>
<tr>
<td>2. Include responsibilities of staff in relation to strategy in pocket guide</td>
<td></td>
<td><strong>June/July 2019</strong></td>
</tr>
<tr>
<td></td>
<td>Details on the Charity and Fundraising Coordinator details are within the Staff Handbook.</td>
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<tr>
<td></td>
<td>In keeping with the Trusts Communications Strategy and the Charity Marketing &amp; Communications Plan, the Fundraising Coordinator will promote the strategy at various locations across the Trust – New Cross Hospital (Heart &amp; Lung Centre, The Event,) Cannock Chase Hospital, West Park Hospital. Fundraising Coordinator will also liaise with colleagues from Patient Experience Team, including the Volunteer</td>
<td></td>
</tr>
<tr>
<td>Training; Consider</td>
<td>1. Mandatory training approval process</td>
<td>Coordinator to ensure that they are aware of the strategy review, as stakeholders may contact them directly for further information.</td>
</tr>
<tr>
<td>2. Completion of mandatory training form</td>
<td>Guidance and the appropriate documentation will be included within the Charity’s intranet/internet pages. Further guidance and support from the Fundraising Coordinator is available to staff, volunteers on request.</td>
<td>June/July 2019</td>
</tr>
</tbody>
</table>

| Development of Forms, leaflets etc; Consider | 1. Any forms developed for use and retention within the clinical record MUST be approved by Health Records Group prior to roll out. |  
| 2. Type, quantity required, where they will be kept / accessed/stored when completed | Associated forms will be available to download on intranet and internet pages. Staff wishing to fundraise will be asked to follow procedures as stated within the strategy. | Complete |

| Strategy / Policy / Procedure communication; Consider | 1. Key communication messages from the policy / procedure, who to and how? | The revised strategy will continue to support the Charity’s aim for a consistent, effective and professional approach to fundraising. It provides a Trust Wide framework to ensure the Charity is fit for purpose and is flexible enough to develop its activities in line with Charitable Fund purposes set out in the governing documents. Staff will be actively encouraged to support fundraising within the Trust. This strategy and associated procedures is applicable to all staff, volunteers and stakeholders that express an interest in fundraising in aid of the Trust Charity. Information will be communicated with senior managers with the | Complete |
| Financial cost implementation  
Consider Business case development | There are cost implications per year for the license of the approved Customer Relationship Management Tool and the appropriate license with the Local Authority to conduct lotteries.  
These costs are accounted for within the annual fundraising budget and are not an additional cost to the Trust. | Complete Fundraising budget approved at CFC 18.03.2019, reviewed every 12 months. |
| --- | --- | --- |
| Other specific Policy issues / actions as required  
e.g. Risks of failure to implement, gaps or barriers to implementation | Prior to 2016, the Charity did not have any written procedures for staff to follow in relation to fundraising.  
Progress to date has been positive but there is still further awareness work to be completed.  
There may also be resistance to the culture of change as Charity priority areas have now changed as well as the approach to fundraising on RWT sites. | Complete |
1.0 Procedure statement

This plan will support the charity’s aim to deliver consistent, effective and professional communications with all of its internal and external stakeholders so that they are fully informed, engaged and supportive of The Royal Wolverhampton NHS Trust Charity and its objectives.

It will support the delivery and execution of the Charity Priorities and New Income Generation plan.

2.0 Accountabilities

As per The Royal Wolverhampton NHS Trust Charity fundraising strategy.

3.0 Roles & responsibilities

3.1 The chief executive officer, the chair of the charity and the head of communications, have overall responsibility for monitoring the work of the charity manager and ensuring the development, maintenance and monitoring of this strategy.

3.2 The charity manager is responsible for the development, maintenance and monitoring of this strategy and is accountable to the head of communications.

3.3 Division & directorate management teams are responsible for the local awareness, implementation and compliance with the requirements of this strategy.

3.4 All staff & volunteers are responsible for complying with this strategy and seek clarification as required.

4.0 Aim / objectives of the plan

4.1 The charity’s aim is to deliver consistent, effective and professional communications with all of its internal and external stakeholders so that they are fully informed, engaged and supportive of the RWT charity and its objectives.
4.2 The overarching objectives of the RWT charity marketing & communications plan will be to:

- Raise awareness of the work of the charity does amongst 85% of stakeholders by the conclusion of this plan.

- Ensure that within the first year of this plan 50% of staff and volunteers know the charity’s mission, increasing year up on year to 80% by the conclusion of this plan.

- Increase the number of donations as follows:
  
  **External Charitable Trusts** by 1% year on year for the lifetime of the fundraising strategy.

  **Corporate Support** by 1% year on year for the lifetime of the fundraising strategy.

  **In Memorium Giving, legacies and fundraising** by 1% year on year for the lifetime of the fundraising strategy.

  **Community** (Individual fundraisers, Gift Aid third party and RWT Charity events) by 2% year on year for the lifetime of the fundraising strategy.

4.3 This plan applies to all trust staff, volunteers and third parties who support the work of the Charity. It is supported by operational governance documents as well as the following Trust policies and protocols:

- CP18 Clinical Photography, Video and Audio recordings
- HS 01 Management of Health & Safety
- OP12 IT Security Policy
- OP13 Information Governance Policy
- OP06 Media Relations Policy
- OP97 Confidentiality Code of Conduct for staff
- Patient Experience and Quality & Safety Strategy
- Communications Strategy
- OP105 VIP/Celebrity visitors to the Trust
- OP68 Volunteer policy
- Social media (personal & Business use) protocol
4.4 This plan should be read in conjunction with the RWT charity fundraising strategy as follows:

**Attachment 2** New Income Generation Activity Plan  
**Attachment 3** Responsible Gaming Protocol  
**Attachment 4** Fund Advisors Guidance  
**Attachment 5** Expenditure of Charitable Funds  
**Attachment 6** Procedure for fundraising in aid of the RWT Charity  
**Attachment 7** Process for making a donation/depositing funds  
**Attachment 8** Process to recognize and acknowledge donations

5.0 **Target audience and stakeholders**

The RWT Charity has many stakeholders which have an interest/support our work – these include (not an exhaustive list)

- The Royal Wolverhampton NHS Trust board  
- Clinical Commissioning Groups that commission services from the Trust  
- Patients, families and staff/volunteers of The Royal Wolverhampton NHS Trust  
- Community Groups – including patient support groups  
- Local schools and educational establishments  
- Local/regional/national press  
- Local/regional/national businesses  
- Third sector organisations

These stakeholders are invested in our work and are our target audience. Communications will be individually tailored to meet their different needs and interests such as RWT staff, corporate supporters and patients and their families.
6.0 Communication of the plan

A high degree of consistency is required between all internal and external communications across all of the hospitals and community services of the Trust, working to a set of agreed principles:

• **Transparency**: we communicate in a timely manner as openly and honestly as possible (recognising the necessity that some information will be confidential).

• **Trust**: we ensure that our messages and channels of communication engender trust among internal teams and external stakeholders.

• **Preparedness**: not all information is required to be communicated externally but we are always prepared to answer questions.

• **Timeliness**: wherever possible, we communicate identical messages at the same time to our internal and external stakeholders.

• **Consistency**: we communicate different things to different audiences but at all times we ensure our messages are consistent across all our external and internal communications.

• **Accuracy**: we do all we can to ensure what we communicate is true and accurate.

6.1 Communications planning and work will focus on four key areas:

• **On-going communications**: providing the channels and deciding the content for regular and consistent communication with our stakeholders.

• **Planned communications**: identifying and planning for the key trigger points and deciding how we communicate these to each stakeholder group as appropriate.

• **Proactive communications**: in partnership with stakeholders we identify the means by which we can maximise support and engagement for the charity, its values and its mission.

• **Crisis communications**: where possible, we identify in advance any issues that may threaten the reputation of the charity and make formal plans to minimise and contain such threats. On this occasion we will provide updates regularly via local/national press (as appropriate).
7.0 Structure and approach

We will comply with the advertising codes of practice issued by the Committee of Advertising Practice (CAP) and the Broadcast Committee of Advertising Practice (BCAP).

All charity communications will be in accordance with all Trust policies and will not contain graphic, distressing or potentially offensive images.

No images or details of patients will be released without a signed Appendix P - Trust Media Consent Form of this plan. Full informed consent is required. If images contain those of a child or vulnerable adult, a parent, guardian or next of kin must also counter sign the form.

The charity manager will maintain responsibility for charity communications with guidance from the head of communications.

Charity branding can only be used with explicit permission from the Charity and must be used in accordance with Appendix O- Approved use of Charity branding.

Strategic Aims

- To support the delivery and execution of the Charity & New Income Generation Plan.
- Increase confidence in The Royal Wolverhampton NHS Trust Charity.
- Raise awareness of The Royal Wolverhampton NHS Trust Charity.
- Support a robust stewardship programme.
- Increase in the number of followers, reach and engagement on social media.

Key communications messages

Messages will be delivered using a variety of different mediums both internally and/or externally to the Trust as appropriate. This will include:

- Articles in the Trust magazine “Trust Talk”.
- All User Bulletins.
- Charity literature – leaflets, posters and banners.
- Charity newsletter.
- Fundraising pack.
- Internet/intranet pages.
• Screen savers.
• Social media.
• Updates and presentations to the Charitable Funds Committee and the Trust Board.
### 9.4 Strategic Aims

<table>
<thead>
<tr>
<th>Objective</th>
<th>Tactic</th>
<th>Anticipated completion date</th>
<th>Review date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Raise awareness of The RWT Charity.</td>
<td>Work with Estates to develop a “customer facing” Charity Hub so as to increase and improve the number of contacts with supporters and to give the Charity additional presence on the New Cross Hospital site. Following evaluation, consider smaller “satellite” areas within CCH and West Park Hospital (staffed by Volunteers with support from the Charity Manager). Utilise a variety of communication mediums – displays, notices, vinyl artwork etc. Engage Volunteer Charity Ambassadors to support the ongoing review and restocking of literature/information. Continue to maintain a database of “good news stories” to effectively demonstrate the difference that the Charity is making to the patient journey/experience. Release a minimum of two charity press releases per month. All of which will considered for inclusion within the charity annual report and accounts. Continue to build on the success of the Charity Newsletter. Increase circulation across all Trust hospital, and community sites and VI practices.</td>
<td>To be demonstrated within the first two years of this plan.</td>
<td>April 2021.</td>
</tr>
<tr>
<td>Increase the physical visibility of the charity across all Trust hospital, community sites and VI practices.</td>
<td></td>
<td>To be demonstrated within the first year of this plan.</td>
<td>April 2020.</td>
</tr>
<tr>
<td>Increase the visibility of the charity within the local community, regionally and nationally.</td>
<td></td>
<td>To be demonstrated within the first year of this plan.</td>
<td>April 2020.</td>
</tr>
<tr>
<td>Ensure that supporter GDPR information is up to date and they wish to receive charity news and information as requested in their preferred format.</td>
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<td>-------------------------------</td>
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<tr>
<td>Increase the number of RWT Charity events – Inc. Charity &amp; Volunteer Awards, RWT Charity Annual Ball, Key anniversary events – 25th Anniversary celebrated Nov 2021.</td>
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<tr>
<td>All RWT Charity fundraising activities will be promoted via the charity web pages (as hosted by the Trust). This includes the internet and the intranet.</td>
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<tr>
<td>Each of the Charity priority areas/themes will have their own charity branded literature that will demonstrate how their trust fund has been used to enhance patient care and experience and how people can get involved and help raise additional funds or make non-monetary donations.</td>
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<tr>
<td>Fundraising campaigns and appeals will demonstrate how donations are spent – a “shopping list” showing examples of what different sizes of donations can be used for, to act as a focus and/or motivation for continued fundraising.</td>
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<tr>
<td>To be demonstrated within the first year of this plan.</td>
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<td>April 2020.</td>
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<tr>
<td>To be demonstrated within the first two years of this plan.</td>
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<tr>
<td>April 2021.</td>
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<tr>
<td>To be demonstrated within the first year of this plan.</td>
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<tr>
<td>April 2020.</td>
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<tr>
<td>To be demonstrated within the first year of this plan.</td>
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<tr>
<td>April 2020.</td>
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<tr>
<td>To be demonstrated within the first year of this plan.</td>
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<tr>
<td>April 2020.</td>
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<tr>
<td>Support a robust stewardship programme and increase confidence in the RWT Charity.</td>
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<tr>
<td>Staff fundraising in aid of any other health related charities will be promoted at the discretion of the communications team. These will not overshadow any fundraising in aid of the RWT charity which will remain a priority.</td>
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</tr>
<tr>
<td>Evaluate the benefits of nominating the charity for local, regional and national awards.</td>
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<tr>
<td>All supporters (Fundraisers, donors and visitors) will receive a formal acknowledgement of their support by fully utilising the Harlequin Customer Relationship Management Tool.</td>
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<tr>
<td>At the discretion of the Charity, the Trust Communications Team and permission from the supporter, this may include:</td>
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</tbody>
</table>
| • An entry into the Book of Celebration  
• A press release issued to the local media.  
• An article within “Trust Talk” and/or the RWT Charity Newsletter  
• Inclusion on social media |
| The Charity will issue all supporters with feedback forms to better understand the supporter’s experience of the Charity. We will increase positive feedback from supporters by 10% year on year for the lifetime of this plan. |
| To be demonstrated within the first two years of this plan. |
| April 2021. |
| April 2020. |
| April 2021. |
Increase in the number of followers, reach and engagement on social media by 25% year on year of the fundraising strategy.

<table>
<thead>
<tr>
<th>Action</th>
<th>Demonstrated</th>
<th>Date</th>
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</thead>
<tbody>
<tr>
<td>Evaluate the benefits of establishing a Corporate Supporters Forum (opportunity to further collaborate with local/regional high profile corporate supporters).</td>
<td>To be demonstrated within the lifetime of this plan.</td>
<td>April 2022.</td>
</tr>
<tr>
<td>Evaluate the benefits of recruiting Patrons for the Charity.</td>
<td>To be demonstrated within the lifetime of this plan.</td>
<td>April 2022.</td>
</tr>
<tr>
<td>Evaluate the benefits of establishing a Charity Forum (opportunity to further collaborate with other local charities that are of benefit to our patients, such as Age UK, Beacon, Compton Hospice, Macmillan and British Heart Foundation etc.).</td>
<td>To be demonstrated within the lifetime of this plan.</td>
<td>April 2022.</td>
</tr>
<tr>
<td>The Charity will fully utilise preferred social media channels to publically acknowledge supporters, celebrate good news stories and to appeal for further support.</td>
<td>To be demonstrated within the first year of this plan.</td>
<td>April 2020.</td>
</tr>
<tr>
<td>Explore the utilisation of Google Analytics to monitor the RWT Charity website to give an accurate benchmark of numbers of supporters engaging with the charity online.</td>
<td>To be demonstrated within the first two years of this plan.</td>
<td>April 2021.</td>
</tr>
</tbody>
</table>
Evaluation and review of the plan

Communications as stated within this plan will be monitored by the charity manager, the communications team and treasury and charitable funds officers to ensure that there is a full cost benefit. The plan will be reviewed annually to allow for changes in communication trends, budget requirements etc.

13.0 Resource assessment

<table>
<thead>
<tr>
<th></th>
<th>Does the implementation of this plan require any additional Capital resources</th>
<th>Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Does the implementation of this policy require additional revenue resources</td>
<td>No</td>
</tr>
<tr>
<td>3</td>
<td>Does the implementation of this policy require additional manpower</td>
<td>Yes</td>
</tr>
<tr>
<td>4</td>
<td>Does the implementation of this policy release any manpower costs through a change in practice</td>
<td>No</td>
</tr>
<tr>
<td>5</td>
<td>Are there additional staff training costs associated with implementing this policy which cannot be delivered through current training programmes or allocated training times for staff.</td>
<td>No</td>
</tr>
</tbody>
</table>
Charity priorities & income generation plan

Attachment 2 Charity priorities and income generation plan 2019 - 2022

MI_5623814
1.0 Procedure statement
As per the RWT Charity Fundraising Strategy.

2.0 Accountabilities
As per the RWT Charity Fundraising Strategy

3.0 Roles & Responsibilities
3.1 Staff and volunteers are responsible for-
   • Complying with the expectations of this procedure
   • Uphold the reputation of their profession and the Trust

   Employees who fail to comply with the requirements of this procedure may be subject to action in accordance with the Trusts Disciplinary Policy (HR03).

3.2 Responsibilities of managers:
Managers are responsible for-
   • Ensuring that employees are aware of this procedure
   • Considering appropriate action when they are informed about behaviour that does not comply with this policy

3.3 Responsibilities of the charity manager
   • Provide staff and volunteers with advice and guidance in the use of this procedure.

4.0 Main strategic aims and targets
Our strategic aim is to support the Trust to realise its vision to be an organisation striving continuously to improve patient experience and outcomes.

We will actively support their commitment to delivering the NHS Long term Plan 2019 and our priority “themes” for 2019-2022 are:

<table>
<thead>
<tr>
<th>Making sure everyone gets the best start in life</th>
<th>Maternity &amp; Neonatal care</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Paediatric care</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Delivering world-class care for major health problems</th>
<th>Cancer care</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Cardiovascular disease</td>
</tr>
<tr>
<td></td>
<td>Diabetes</td>
</tr>
<tr>
<td></td>
<td>Innovation &amp; Research</td>
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<tr>
<td></td>
<td>Respiratory disease</td>
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<tr>
<td></td>
<td>Stroke care</td>
</tr>
<tr>
<td></td>
<td>Urgent &amp; Emergency care</td>
</tr>
</tbody>
</table>
## Supporting people to age well

- Improving experience for carers
- Community care – to prevent unnecessary admissions and support timely discharges from hospital
- Dementia care
- End of life care

## Workforce

- Staff recruitment, retention and development of work force
- Volunteering

The strategic aims of the charity are split into key areas of income generation that have been identified as:

- External Charitable Trusts & Corporate Support
- In Memorium Giving, legacies and fundraising
- Community (Individual fundraisers, Gift Aid third party and RWT Charity events)
- Investment Income
- Charity trading activities

Data collected throughout the lifetime of the strategy will enable a true financial analysis and realistic target setting, which will better inform subsequent strategies.

Fundraising targets are based on the following assumptions:

- The Trust’s excellent reputation and public confidence remains unaffected. Following June 2018 CQC report it is rated as ‘Good’ overall as well as achieving ‘Good’ ratings in the 'effective, caring, responsive and well led' categories. The Trust is working towards an ‘Outstanding’ rating.

- There is agreement between the Trust, the Charity and the general public within the communities we serve, that the identified areas of work that this strategy supports are relevant, meaningful and will be of benefit to RWT patients, their families and the staff that treat them. There must be complete “buy in” so as to generate support and ensure the successful of specific fundraising campaigns.

- Fundraising targets only take into consideration monetary donations and not the monetary value of donations of specific items/objects. The appropriate declarations as to the value of these gifts will be completed as required.
• Fund advisors will inform the Charity (on an annual basis) of their spending intentions for the subsequent year so that any additional support for fundraising can be considered and coordinated as requested.

• By 2020/21, the Charity will recruit a full complement of volunteer charity ambassadors to support promotional and fundraising activities. Volunteers will be appropriately trained so as to increase the capacity of the Charity team. It is anticipated that the increase in volunteers will also impact on Community Fundraising levels as the additional resource of volunteers will be trained to facilitate and support community events.

• By 2019/20, the Charity will be located within a central “hub” at New Cross Hospital, with satellite “hubs” within Cannock Chase Hospital and West Park Hospital (2020/21). The central hub will have the capacity to hold an increasing team, improving communication and team work as well as raise awareness of the Charity with patients, their families and staff.

5.0 Risk management – financial and reputational risks

“Charitable Funds” refers to funds that have not been received as part of the Trust’s usual business. They must be treated differently from other funds as they consist of money given for charitable purposes. This means that they are subject to the Charities Act 1992, 1993, 2006 and 2011.

The Charities Statement of Recommended Practice (SORP 2005) summarises, in a single document, the way in which UK accounting standards apply to charity accrual accounts. It also explains legal and organisational issues that underlie charity accounting and explains what information a charity needs to include in a Trustee’s Annual Report. Trustees are required to make a statement confirming that “The major risks, to which the charity is exposed, as identified by the trustees, have been reviewed and systems have been established to manage those risks”.

The term “Risk” is used to describe the uncertainty surrounding events and their outcomes that may have a significant effect, either enhancing or inhibiting:

• Operational performance

• Achievement of aims and objectives

• Or meeting expectations of stakeholders

As part of the Charity’s annual return, trustees must declare that there are no serious incidents or other matters which they must have brought to the attention of the Charity Commission but have not. Failure to provide this confirmation would be breach of legal
requirements.
The Charity's approach to income generation has clearly defined processes in place for the protection of the Trust, the Charity, patients, their families and other stakeholders.

In the event that a serious incident arises within the Charity (an incident which has the potential to significantly harm the Charity’s work, beneficiaries or reputation) trustees will follow all appropriate Trust policies.

As appropriate, we will also inform external bodies such as the Information Commissioners Office or the Charities Commission.

Risk associated with specific fundraising campaigns & appeals

Trustees will consider both the financial and reputational risks associated with such appeals. They will ensure that certain assurances are in place which will guarantee its success. There will be clear contingency plans, in the likelihood that the appeal is unsuccessful in reaching the specified fundraising target.

For example trustees must consider whether a proposed appeal is a specialist “ask” from the general public and stakeholders. Particular appeals may not get the support locally/regionally/nationally that is required to guarantee that the required funds are raised.

The following risks will affect the Charity’s ability to achieving its targets:

- We are aware that Wolverhampton is one of the most deprived Local Authorities and is in the bottom quintile when compared to other Local Authorities. Deprivation is worse than the England average therefore people do not have the disposable income to support charities in the same way as other parts of the UK.

- Changes to the Economy through Brexit will impact on local, regional and national business, thus impacting on their capacity to support charities.

- The Trust’s CQC rating may impact on public confidence and their readiness to support the Trust through charitable giving. Some stakeholders may not understand the context of the report and the key aims of the Charity might be undermined.

- The Charity may not recruit the required number of volunteers within the time scale required to deliver the strategy.
Risk associated with Investment income

Inflation is the key risk to the long term portfolio and the assets will be invested to mitigate this risk over the long term. This is likely to mean that investment will be concentrated in real assets and that the capital value will fluctuate. The short term portfolio is held to provide financial security, and may be required at short notice. As such capital volatility cannot be tolerated and investment of these assets should be focused on minimising this.

6.0 Management of Funds

The Charitable Funds Committee will review and update, as appropriate, the investment and reserves policy which will take account of current and future requirements. Furthermore, plans for the use of non-cash resources such as volunteers, donated goods and assets will also be agreed by the Committee. The Trust Board and Charitable Funds Committee will consider collaborations and partnerships with other organisations to improve efficiency and better delivery of services as appropriate.
7.0 Activity Plan

7.1 External charitable trusts and corporate support

Strategic aims

- Establish and continue to foster good working relationships with charitable trusts and foundations and corporate supporters.

- Increase new income from charitable trusts and foundations by 1% year on year for the lifetime of the fundraising strategy.

- Increase new income from Corporate Supporters by 1% year on year for the lifetime of the fundraising strategy.

Targets will be reviewed and adjusted accordingly on an annual basis in line with the anticipated increase in capacity of the fundraising team.

Current position

According to the Association of Charitable Foundations, trusts and foundations across the UK provide about 5% of the total funding of the charitable and wider voluntary sector.

New fundraising income from charitable trusts and corporate support has been a result of proactive approaches to both new and past supporters. The development of a strong working relationship between the Charity and the Black Country Chamber of Commerce has resulted in new support.
## Charitable Trusts and Foundations

<table>
<thead>
<tr>
<th>Objective</th>
<th>Tactic</th>
<th>Completion date</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Increase the value of successful applications to charitable trusts and foundations by 1% year on year – such as WARRANT.</strong></td>
<td><strong>We will utilize existing contacts to identify Charitable Trusts and Foundations that match the Charity’s spending priorities.</strong>&lt;br&gt;<strong>We will build relationships with key personnel in the NHS to enable approaches for charitable funds to be made. This will be achieved by working with fund advisors, supporting them to develop comprehensive annual spending plans.</strong>&lt;br&gt;<strong>Fund advisors will identify key individuals to coordinate and disseminate information as required for funding applications. This will result in the quality of applications improving and an increase in the number of successful applications.</strong>&lt;br&gt;<strong>We will continue to manage the application process effectively by recording outcome of applications using our Customer Relationship Management tool.</strong></td>
<td>Review November 2019</td>
</tr>
<tr>
<td>The top 50% funds of overall fund balances will provide a comprehensive spending plan.</td>
<td></td>
<td>January 2020</td>
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</tbody>
</table>
### Corporate Support

<table>
<thead>
<tr>
<th>Objective</th>
<th>Tactic</th>
<th>Completion date</th>
</tr>
</thead>
</table>
| Increase new income from Corporate Supporters locally, regionally and nationally by 1% year on year for the lifetime of the fundraising strategy | Improve stewardship for corporate supporters. By improving our “offer” to corporate supporters, they are more likely to be motivated to make RWT Charity their chosen charity.  
We will actively seek feedback on their experience of the charity to help inform our donor stewardship.  
**Employee Fundraising and non-monetary donations**  
We will encourage regular on-going low level corporate support, which will benefit the high level activity by delivering presentations to employees during staff away days/ fundraising days (as and when requested).  
We will continue to update existing corporate supporters of particular fundraising opportunities and ways they can support our mission (in accordance with GDPR guidance).  
We will continue to proactively identify high level corporate fundraising partnerships that develop mutually beneficial strategic relationships.  
We will develop closer relationships with new and existing retailers across the three hospital sites.  
We will evaluate the benefits of establishing a Corporate Supporters Group - led by senior business figures. | October 2019  
March 2020 |
7.2 In Memoriam Giving, Legacies and fundraising

Strategic Aims

- Increase new income from “In Memoriam” Giving and Legacies by 1% year on year for the lifetime of the fundraising strategy.

- Increase “In Memoriam” giving donations or fundraising registrations by 1% year on year for the lifetime of the strategy.

- Retain in memoriam support from friends and families by 1% year on year for the lifetime of this strategy.

Targets will be reviewed and adjusted accordingly on an annual basis in line with the anticipated increase in capacity of the fundraising team.

Current position

According to “Memory Giving” over £80m is given in memory each year by family and friends in the UK as an inspiring way to celebrate the life of a loved one. It also gives families the opportunity to continue to recognize other special moments and occasions such as birthdays and Christmas.

According to FSI (Foundation for Social Improvement) 75% of people give to charity “In life”, 35% of those also leave a gift in their will to their chosen charity, however due a number of factors, only 6% actually do.
### In Memoriam Giving, Legacies and fundraising

<table>
<thead>
<tr>
<th>Objective</th>
<th>Tactic</th>
<th>Completion date</th>
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</thead>
<tbody>
<tr>
<td>To increase new income from “In Memoriam” giving and legacies by 1% year on year for the lifetime of the fundraising strategy.</td>
<td>We will continue with a proactive, systematic approach towards funeral directors and solicitors to establish working relationships to increase our network and income.</td>
<td>2019/20</td>
</tr>
<tr>
<td>Increase “In Memoriam” giving donations or fundraising registrations by 1% year on year for the lifetime of the strategy.</td>
<td>We will actively promote legacies with a marketing campaign, using a range of media (running continuously internally and externally to the hospital).</td>
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</tr>
<tr>
<td>Retain in memoriam support from friends and families by 1% year on year for the life time of this strategy.</td>
<td>We aspire to include “real” examples within our campaigns - individuals and their families who have chosen to support the Charity in this manner.</td>
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</tr>
<tr>
<td></td>
<td>We will ensure that supporters and their loved ones are thanked in a sensitive and timely manner by fully utilizing our Fundraising CRM tool. This will also include opportunities to publically thank our supporters (if requested and appropriate).</td>
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<tr>
<td></td>
<td>We will continue to promote the use of our online “Book of Celebration” as means of acknowledging in memoriam donations and fundraising.</td>
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<tr>
<td></td>
<td>Explore and develop opportunities for families and loved ones to remember their loved ones particularly special occasions such as anniversaries or birthday.</td>
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</tbody>
</table>
7.3 **Community Fundraising**

**Strategic aims**

- Establish a fully functioning charity team
- Establish a front facing charity “hub”.
- Increase in the number of stakeholders registering to fundraise in aid of the charity) by 2% year on year for the lifetime of the fundraising strategy.
- Increase donation income; including non-monetary donations (ex-gracia payments) by 2% year on year for the lifetime of the fundraising strategy.
- Increase the charity’s community income over the period of the strategy by 2% year on year for the lifetime of the fundraising strategy.
- Improve the quality of the information available about how charitable funds are used.
- Increase the income generated from the Gift Aid scheme by 1% year on year for the lifetime of this strategy.
- Evaluate the benefits of establishing a Charity Forum.
- Increase in the number of Unity Lottery players registering to play in aid of The RWT Charity by 10% year on year of the lifetime of the fundraising strategy.

Targets will be reviewed and adjusted accordingly on an annual basis in line with the anticipated increase in capacity of the fundraising team.

**Current position**

Community fundraising income is generally thanks to previous patients and/or their families who wish to demonstrate their appreciation for care received from specific departments/wards.
<table>
<thead>
<tr>
<th>Objectives</th>
<th>Tactic</th>
<th>Completion date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish a fully functioning charity team.</td>
<td>We will recruit a Community &amp; Events Fundraiser and a complement of Volunteer Charity Ambassadors to support the function of the charity.</td>
<td></td>
</tr>
<tr>
<td>Establish a front facing charity “hub”.</td>
<td>The charity team will be based within an appropriate location at New Cross Hospital and Cannock Chase Hospital in which to further increase the awareness of the charity and improve stakeholder experience.</td>
<td></td>
</tr>
<tr>
<td>Increase the number of stakeholders registering to fundraise in aid of the charity) by 2% year on year for the lifetime of the fundraising strategy.</td>
<td>We will build relationships with key personnel in the NHS and support them to develop comprehensive annual spending plans. This will equip the fundraising team with “wish list” items that can promoted with supporters who are seeking projects to support.</td>
<td>2020</td>
</tr>
<tr>
<td>Increase the value of donations (including non-monetary donations) by 2% year on year for the lifetime of the fundraising strategy.</td>
<td>Information received will support informed discussions for the need of large scale fundraising appeals. Each of these appeals will have a clear fundraising strategy and delivery plan with identified audiences and gift tables, aligned to a suite of cases for support, audiences and products, realistic income parameters and associated levels of resourcing as well as any risks and potential competitors.</td>
<td></td>
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<tr>
<td>Increase the charity’s community income over the period of the strategy by 2% year on year for the lifetime of the fundraising strategy.</td>
<td>The charity team will have the capacity to undertake specific fundraising projects through the coordination of community fundraising as well as hosting our own events/fundraising activities.</td>
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<td></td>
<td>We will continue to encourage health related charities to utilize RWT sites for their fundraising, with the prior agreement that 50% of funds raised will be donated into the appropriate RWT Charity trust fund.</td>
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<tr>
<td>Improve the quality of the information available about how charitable funds are used.</td>
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<tr>
<td>We will strengthen our working relationships with local schools and educational establishments.</td>
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<tr>
<td>Increase the income generated from the Gift Aid scheme by 1% year on year for the lifetime of this strategy.</td>
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<tr>
<td>We will build on our current “offer” to help support the development of functional and psycho-social skills.</td>
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<tr>
<td>Evaluate the benefits of establishing a Charity Forum.</td>
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<tr>
<td>We will develop a systematic approach to the collecting and collating feedback from schools and educational establishments.</td>
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<tr>
<td>Increase in the number of Unity Lottery players registering to play in aid of The RWT Charity by 10% year on year of the lifetime of the fundraising strategy.</td>
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<td></td>
</tr>
<tr>
<td>We will continue to engage with all supporters and ensure that they receive regular updates on how their support has been of benefit throughout the Trust (in accordance with GDPR law and Trust policies).</td>
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<tr>
<td>A cohesive approach to fundraising campaigns and appeals that support specific patient groups e.g. Care of the Elderly (Age UK), End of Life Care (Compton Care), Cancer service (Macmillan) Cardiac (British Heart Foundation).</td>
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</tr>
<tr>
<td>We will actively promote our working partnership with Sterling Lotteries (Unity Lottery) all staff and other stakeholders.</td>
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</tbody>
</table>
7.4 Investment income

The investment objectives for the Charity are as follows:

- We will seek to produce the best financial return within an acceptable level of risk.

- The investment objective for the long term portfolio is to generate a return in excess of inflation over the long term whilst generating an income to support the on-going activities of the Charity.

- The investment objective for the short term portfolio is to preserve the capital value with a minimum level of risk. Assets should be readily available to meet unanticipated cash flow requirements.

The Royal Wolverhampton NHS Trust Charity has approximately a 50/50 split for investments between long term and short term, in order that unanticipated cash flow needs can be met.

Due to the nature of the investment, we will keep at least 90% of the long term portfolio in investments that can be realised within three months. All of the short term investments should be realisable within one month.

The Charity has a professional investment management firm to manage the assets on a discretionary basis, in line with the investment policy.

The Charitable Funds Committee will agree the investment strategy and monitor the investment assets.

The committee will review the information provided by the investment manager at each quarterly meeting. The investment manager will present in person to the committee on an annual basis.

Ethical Investment

The Charity has adopted an ethical investment policy to ensure that its investments do not conflict with its aims.

The Charity's ethical investment policy precludes direct or indirect investment in companies that generate more than 10% of revenues from alcohol, armaments, gambling, pornography and will not invest in tobacco.

The Charity will review its approach to investment income on an annual basis to ensure continuing appropriateness.
7.5 Charity Trading Activities

Under the law of England and Wales, charities may engage in some types of trading (an exchange of goods or services for money) which contribute directly to the furtherance of their charitable objects, or (where the purpose is to raise funds for the charity) which do not involve significant risk.

Charity law imposes restrictions on the nature and level of trading activity charities can carry out and some types of trading will subject to tax.

There are two main types of trading carried out by charities, which have very different charity law and tax implications. These are primary purpose trading and non-primary purpose trading.

The RWT Charity does not currently undertake any trading activities and a full option appraisal (with professional specialist advice) will be completed in 2019/20 to enable trustees to make an informed decision.